

“We improved productivity by migrating our paper-based process to the paperless, on-demand solution from EstateWorks.”

“In addition to the checklist feature, whose rules-based system we rely on to keep us informed of due dates for court and tax filings and scheduled client contacts, we have found the notes feature (particularly the ability to email notes and reminders to team members) and the ability to upload documents to the EstateWorks system and attach them to client matters for easy retrieval at anytime from anywhere, to be indispensable.”

Richard P. Breed, III
Member at
Tarlow, Breed, Hart & Rodgers

Tarlow, Breed, Hart & Rodgers, P.C. is a full service law firm with clients throughout New England. The firm is unique in its ability to provide comprehensive and high quality legal services normally associated with significantly larger firms but in a more cost-effective manner.

With an interest in reducing costs and improving productivity, without compromising its high quality legal service, the T&E practice group at Tarlow Breed turned to EstateWorks to transform its heavily paper-based, home grown estate planning and administration processes into more efficient electronic processes with a centralized database for all estate related matters. Using EstateWorks TruePlan and TrueSettlement solutions, Tarlow Breed has automated manual processes, improved task assignment and tracking, significantly reduced the time required to access and manage client estate matters, and improved collaboration among team members.

Long Term Benefits

	Year 1	Year 2	Year 3	Total
Annual Fees	\$14,000	\$15,920	\$17,898	\$47,818
Productivity Savings	\$131,250	\$180,250	\$230,720	\$542,220
Net Savings	\$117,250	\$164,330	\$212,822	\$494,402

Measuring Success

EstateWorks Savings Summary	
Return on Investment (ROI)	1034%
Payback Period (in Months)	1
Total Net Savings	\$494,402

Tarlow, Breed, Hart & Rodgers generated enough incremental productivity to more than offset the cost to deploy the EstateWorks system. On average, users save between three and five hours per week using EstateWorks when compared to traditional methods. Based on a conservative assessment, the productivity benefit realized is almost \$200,000 per year over a three year period which is an ROI over 1000% and a 1 month payback.

Projected Annual Benefit

